Captaris

RightFax

Version 2.5

MFP Module Guide for the
Sharp Extension

Edition

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Chapter 1
Installing the RightFax MFP Module

Overview of the RightFax MFP Module

The Sharp Extension for the RightFax MFP Module lets you link one or more of several supported Sharp Multi-Function Products (MFPs) via your network to the RightFax server. This lets users scan documents on the Sharp MFP and transmit them as fax or e-mail messages through the RightFax server. Scanned documents can be transmitted normally to fax and e-mail destinations, or sent via certified delivery or encrypted for security using the RightFax SecureDocs Module (described in the *RightFax SecureDocs Module Guide*.) For information on using the Sharp MFP to scan and transmit documents via the RightFax server, see Chapter 2, "Configuring the Repository Folder and RightFax Interface on the Sharp MFPs".

The RightFax MFP Module Sharp Extension connects the RightFax server and Sharp MFPs using a software module called the External Document Connector (EDC). This module monitors folders on your network, called "repositories," for Sharp documents to process and transmit. Sharp MFPs that you want to use to submit fax jobs to the RightFax server must all be configured to store scanned documents in the same network folder that you configure the EDC to monitor. Refer to your Sharp documentation for instructions on setting this folder location.

To create an interface for users on the Sharp device, you must create a Metadata dialog on the Sharp using the browser-based software installed on the Sharp device. This Metadata dialog includes data entry fields such as destination fax number and user ID, and each of these fields is identified using specific key words that the RightFax server can process. When users enter transmission information in these fields, the data is packaged along with the scanned image in a way that the RightFax server can interpret and use. For information on creating a Workflow for use with RightFax, see Chapter 2, "Configuring the Repository Folder and RightFax Interface on the Sharp MFPs".

Using each of these components, the Sharp extension of the RightFax MFP Module lets users scan and transmit faxes by following this sequence of events:

1. Using either the Sharp MFP fax functionality or one of the RightFax-specific templates, the user enters fax transmission information on the Sharp MFP and scans the document.

2. The Sharp MFP saves the document as an image file and then stores the file in the repository folder on the network.

3. The External Document Connector picks up the image file from the repository, converts it to a file format appropriate for use by the RightFax server, and then places it in the RightFax send queue for transmission.

4. The RightFax server transmits the file as a fax or e-mail message to the destination specified by the user on the Sharp MFP.

RightFax Server Support and Requirements

All RightFax servers that will be used for sending faxes from Sharp devices must be version 9.0 or higher. Microsoft Internet Explorer version 6 is required on all RightFax servers.

The repository folder where outbound faxes originating from the Sharp device will be placed must be configured as an FTP site on an IIS server on your network. Before you begin, ensure that the FTP component is installed on the IIS server you want to use. You should also add a subfolder called Sharp under the \Inetpub\ftproot folder on the IIS server. This will be used as the repository folder.

If you are upgrading from an earlier version of the External Document Connector

Installing the RightFax MFP Module will overwrite all earlier versions of the RightFax External Document Connector (EDC) for Sharp extensions, discarding any existing configuration settings. Captaris strongly recommends that you write down or take screenshots of the existing configuration settings before installing the RightFax MFP Module. Many of these settings will be reused with the RightFax MFP module and information about your existing EDC settings will simplify the process of configuring the new module.

Sharp MFP Support and Requirements

The RightFax MFP Module supports the following Sharp models:

- AR-M350N
- AR-M450N
- AR-M550N
- AR-M620N
- AR-M700N

Important *Your Sharp device includes configuration software can be accessed via a Web browser. To access this software, you must know the IP address of the Sharp device. If you have not already set up the Sharp device so that this software is accessible you should do so now.*

Install the RightFax MFP Module

To install the RightFax MFP Module, you must complete the following steps:

1. Download the RightFax MFP Module (described on)

2. Run the RightFax MFP Module installation (described on)

The MFP Module installation program copies the module's files to the RightFax server and lets you configure some of the settings required to integrate RightFax with your Sharp MFPs.

Important information about installations and upgrades

Do not re-run this installation if you have already installed this version of the MFP Module or if you have installed any other RightFax products which use the same installation architecture as this product. Doing so will detect the existing installation and offer the options **Repair** and **Uninstall**. Selecting **Repair** will cause any existing configuration settings to be overwritten with default settings. If you have already installed this product or any of the

other RightFax MFP Module 2.5 products, reinstallation is not necessary. Instead, you only need to contact Captaris Support to activate the Connector.

If you are running a new install, you should proceed with the installation instructions in the next section. However, if you are upgrading from version 2.0 to version 2.5, running the installation program may cause all jobs that are currently in the queue to be lost. Follow these steps for all installed EDC modules when upgrading from 2.0 to 2.5 to avoid losing any pending jobs in the External Document Connector:

1. On the RightFax server, select **Start** > **All Programs** > **RightFax EDC Monitor** to open the **EDC Monitor** application.

2. Select **Tools** > **Advanced EDC Configuration** to open the **Captaris EDC Configuration** dialog box.

3. Click the **Sources** tab.

4. Double-click the module that you want to stop.

5. Select the option **Pause scanning for new jobs**.

6. Click **OK** to save the changes and exit back to the EDC Monitor.

7. Monitor the **DataFlow** pane in the EDC Monitor. When the job count for the **Begin** and **End** FlowPoints is equal, there are no more pending jobs and you can begin the upgrade installation (described in the next section).

   After the new version is installed, the modules will all be reset so that they process jobs.

Downloading the RightFax MFP Module

✎ **Note** *Although the RightFax MFP module can be downloaded freely, it does require that a valid software license be purchased before the software can be enabled by a Captaris Support representative. For information on purchasing a software license for the RightFax MFP Module, please contact your Captaris salesperson or RightFax product retailer.*

The RightFax MFP Module is downloaded from the Captaris Web site and must be installed directly on each RightFax server that will support extension to your Sharp MFPs. For this reason, you should either download the installation file directly to your RightFax server(s) or to a location on your network that is accessible by all RightFax servers on which it will be run.

Running the RightFax MFP Module installation

The MFP Module installation program includes a configuration wizard which lets you license and configure the Sharp MFP module as part of the software installation. The RightFax MFP Module must be installed directly on each RightFax server that will support extension to your Sharp MFPs. Before installing the RightFax MFP module, ensure that the most recent Service Pack has been applied to your RightFax server.

To install the RightFax MFP Module

1. The RightFax MFP Module installation software is downloaded as a ZIP file that contains one executable file called *Setup.exe*. Extract *Setup.exe* directly to your RightFax server(s) or to a location on your network that is accessible by all RightFax servers on which it will be run.

2. Run *Setup.exe*. This opens the RightFax MFP Module installation wizard.

3. Click **Next** on the opening screen. This opens the RightFax MFP Module license agreement. You must select the option to accept the license agreement in order to continue the installation. Click **Next**.

4. Click **Install** to begin the installation. If, during the installation, you see a brief warning message indicating that the MFP Module registry key(s) were not found, the installation will automatically create the required registry keys. No action is required.

5. When the installation is complete, select the **Launch Captaris Integrations Product Suite** option and click **Finish**. This opens the **EDC Configuration Wizard**.

6. Select **Add/Remove Modules** and click **Next**.

    Important   The following product activation steps are unnecessary if you are upgrading from a previous version of this module. When upgrading, the product will remain activated from your previous installation. If you have already activated an earlier version of this module, skip to step 10.

7. On the **Add/Remove Modules** screen, click the **Licensing** button. This opens a screen that lets you enter a licensing code that will enable the MFP Module on the RightFax server.

8. If you are performing a new installation, contact the RightFax Product Support Group at (520) 320-7070. A support representative will assist you through the rest of the activation process.

9. After you have applied the licensing code for the Sharp MFP Module, you will return to the **Add/Remove Modules** screen.

10. Select "Sharp MFP" in the **Available Modules** list and then click the **Add** button. If prompted to add additional components required for this module, select **OK**. Click **Next**.

11. On the **Wizard Summary** screen, click **Next**.

12. On the **Select Module** screen, select Sharp MFP in the list of modules and click **Next**. This opens the **Device Repository** screen.

13. In the **New Path** field, type or browse to the path to the Sharp repository folder on your network. The repository folder must be located on an IIS server on your network and be a subfolder of the \Inetpub\ftproot folder. You may specify either a UNC path or a folder name on a mapped or local drive.

    Click **Add** to add the repository folder to the **Repository Paths** list.

    Repeat this step for each Sharp repository folder on your network. When all Sharp repository folders that will be monitored by the RightFax server have been added, click **Next**. This opens the **RightFax Setup** screen.

14. In the **RightFax Server Name** field, type the name of the RightFax server which the External Document Connector will use for transmitting documents. By default, a dot appears in this field indicating that the External Document Connector will use the RightFax server on local machine. You only need to change this value if you want the External Document Connector to use a RightFax server installed on a different computer.

15. The **Default User Name** field is the RightFax user ID that will be used for all faxes originating from Sharp MFPs that do not have a RightFax user ID specified.

    The Default RightFax user ID is set to WALKUP by default. This is the RightFax user ID that will be used for all faxes originating from Sharp MFPs that do not have a RightFax user ID specified. If you plan to use a fax template that requires users to enter their RightFax user ID when sending faxes, you do not need to change this setting. However, if you plan to use Sharp's generic fax functionality or a template that does not require users to enter a RightFax user ID, you must set this option to the user ID that you want to be used by the RightFax server to send faxes.

If you want to use the default RightFax user ID "WALKUP," you *must* create this user ID in RightFax using Enterprise Fax Manager. Alternatively, you can set the **Default User Name** field to the name of an existing RightFax user ID. Regardless of the user ID you specify, the user ID should be configured in RightFax with the sending options that you want for all faxes originating from Sharp MFPs. For information about creating and configuring RightFax user IDs, refer to the *RightFax Administrator's Guide*.

16. In the **Default To Name** field, enter a name that will be used as the name of the intended recipient on the fax cover sheet if no recipient name is specified by the sender.

17. In the **Default From Name** field, enter a name that will be used as the name of the sender on the fax cover sheet if no RightFax user ID is specified by the sender.

18. Click **Next**. This opens the **Print Notifications?** screen.

19. Select **Print Notification** only if you want a transmission status message to be automatically printed on the Sharp MFP each time it is used. Click **Next**. This opens the **Email Notifications?** screen.

20. Select **Email Notifications** only if you want a transmission status message to be automatically e-mailed back to the sender. If you select this option, you must also specify an SMTP server name, a destination e-mail address to use when no e-mail address is available for the sender, and a sender name for the message. Click **Next**.

21. On the **Wizard Summary** screen, click **Finish**.

■ ■ ■

Chapter 2
Configuring the Repository Folder and RightFax Interface on the Sharp MFPs

Sharp MFPs must be configured in two ways before they will be able to communicate with the RightFax server using the RightFax MFP Module. You must configure the repository folder where the Sharp device will store outbound documents intended for the RightFax server, and you must create an interface on the Sharp device that will allow users to input transmission data (such as the destination fax number).

To create an interface for users on the Sharp device, you can design a Metadata set, or you can use the Fax interface provided on the Sharp device. Metadata sets include user input fields such as destination fax number and user ID, and each user input field has a keyword assigned to it that tells the RightFax server what data is being entered in that field.

Create and Configure the Repository Folder

Important *Your Sharp device includes configuration software can be accessed via a Web browser. To access this software, you must know the IP address of the Sharp device. If you have not already set up the Sharp device so that this software is accessible you should do so now.*

The repository folder must be located on an IIS server on your network, and is configured as part of the IIS FTP settings. Before you begin this procedure, ensure that the FTP component is installed on the IIS server you want to use.

After you have created a repository folder on the IIS server, you must configure the Sharp device to use this repository folder for outbound fax documents regardless of the fax interface you want to provide users on the Sharp device. If you choose to use the Fax functionality built into the Sharp device, this is the only required step. After this configuration has been completed, the Sharp device will use the RightFax server when the Fax functionality is used.

To create the Sharp repository folder

1. On the IIS server, create a new folder called Sharp under \Inetpub\ftproot.

2. Select **Start > Programs > Administrative Tools > IIS Manager**. This runs the IIS Manager application.

3. Expand **FTP Sites** in the tree in the left pane.

4. Right-click **Default FTP Site** and select **Properties** from the shortcut menu.

5. On the **Default FTP Site Properties** dialog box, click the **Home Directory** tab.

6. If it is not already checked, enable the **Write** option to ensure that the default FTP site has write permissions.

7. Close IIS Manager.

To configure the repository folder on the Sharp device

1. Open a Web browser and navigate to the IP address of the Sharp device. This opens a page containing Sharp configuration options.

2. Scroll to the bottom of the pane on the left and click **Fax Server**. This opens the **Fax Server Setup** screen.

Figure 2.1 Fax Server settings on the Sharp device
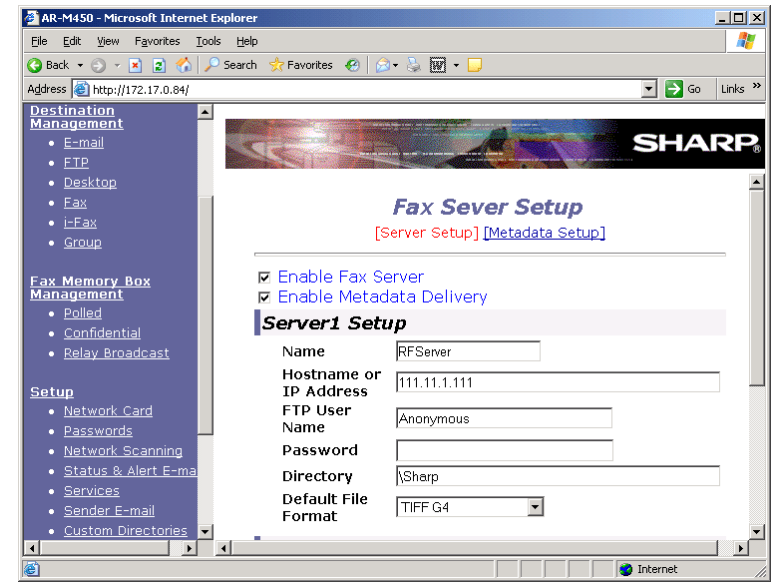
3. Check both options **Enable Fax Server** and **Enable Metadata Delivery**.

4. Under **Server1 Setup**, in the **Name** field, enter the machine name of the RightFax server.

5. In the **Hostname or IP Address** field, enter the IP address of the IIS server where the repository folder is located.

6. In the **FTP User Name** field, enter the FTP user that the Sharp device will use to access the FTP site.

7. In the **Password** field, type a password for the specified FTP user if applicable.

8. In the **Directory** field, type **\Sharp** (this is the repository folder you created under the \Inetpub\ftproot folder on the IIS server).

9. Set **Default File Format** to **TIFF G4**.

10. The remaining settings under **Server2 Setup** are not used and should not be changed. Click the **Submit** button at the bottom of the screen to save and exit.

Create a RightFax User Interface on the Sharp

If you choose to use a custom RightFax user interface on the Sharp device, you must create one or more custom Metadata sets that include specific RightFax input fields.

To add a RightFax Metadata set

1. Open a Web browser and navigate to the IP address of the Sharp device. This opens a page containing Sharp configuration options.

2. Scroll to the bottom of the pane on the left and click **Fax Server**. This opens the **Fax Server Setup** screen.

3. Click **Metadata Setup** under the **Fax Server Setup** heading, and then click **Add** under **New Metadata Set**. This opens the **Metadata Set Control** screen.

Figure 2.2 The Metadata Set Control screen for the Sharp device
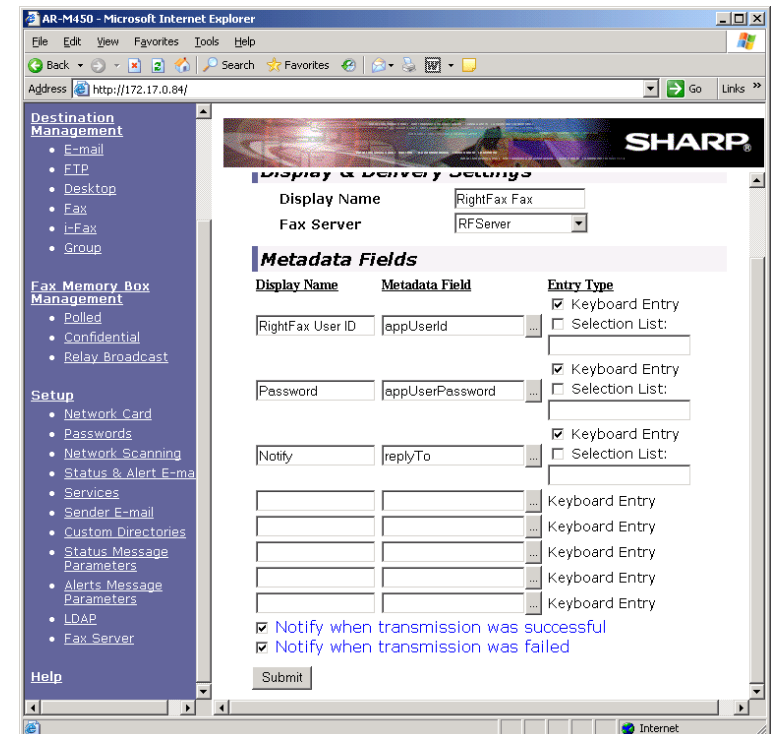
4. In the **Display Name** field, enter a name for the Metadata set as it will appear on the Sharp device.

5. In the **Fax Server** field, enter the name of the RightFax server.

6. To add a prompt (a data entry field), you must enter a specific RightFax keyword in the **Metadata Field** and the actual text that will be displayed on the Sharp device in the **Display Name** field. The following table lists all of the prompts that you can add to the form. The **Metadata Field** text must match the RightFax keyword exactly, however, you can enter any text you like in the **Display Name** field.

Table 2a Valid prompt names to add to the form

Metadata Text (RightFax Keyword)	Description
appUserId	The RightFax user ID of the sender. If this prompt is left blank or not included in the form, the Sharp will use the default user ID that you specified when configuring the RightFax MFP module.
appUserPassword	The RightFax password for the specified user ID. A password is only required if you include the appUserPasswordOn Metadata field.
appUserPasswordOn	A flag that indicates that a password will be required for the RightFax user ID.
billCode1	Billing code 1.
billCode2	Billing code 2.
coverSheet	The name of the RightFax cover sheet file to use.
documentPassword	The password that will be used to encrypt the PDF document when using SecureDocs.
documentSubject	Subject text for documents that will be transmitted to e-mail addresses. Enter a maximum of 70 characters.
fromName	The sender's name as it will appear on the fax cover sheet.

Table 2a Valid prompt names to add to the form (Continued)

Metadata Text (RightFax Keyword)	Description
phonebookId	The name of a RightFax phonebook, for use when sending to multiple recipients.
replyTo	The sender's e-mail address where transmission notifications will be sent.

You can add any prompts that you want to the form. The appUserID and replyTo fields are recommended for all types of faxing. The documentPassword field is required for sending using the SecureDocs feature

7. After you enter the **Display Name** and **Metadata Field** text for all of the prompts you want, click **Submit**. The Sharp's display panel should now allow access to the new Metadata set.

Sending a document from the Sharp device

Because the Metadata set is accessed from the fax menu on the Sharp device, there are no Metadata fields for fax number or e-mail address. These fields are built-in to the Sharp fax menu. You must enter a destination fax number or e-mail address after completing the Metadata set.

Sending a Document to a Phonebook Group

If you want to send a document to multiple recipients at one time, you must add the Metadata field "phonebookId" to a metadata set and enter the phonebook group there. When you use this Metadata field, you must also enter a number in the **Fax Number** field on the Sharp device before the document will send. In all cases, the phonebook group name must exist in the specified RightFax user's phonebook (or the default user's phonebook if no RightFax user ID is specified).

RightFax phonebook groups are stored for each individual RightFax user ID and can be viewed using the FaxUtil client. To view a list of phonebook entries for a user, run FaxUtil as that user and select **Tools > Phonebook**. This opens the **Phonebook** dialog box and a list of phonebook groups appears in the top list pane.

If the phonebook group does not exist for the RightFax user being used as the fax owner, the document will not transmit.

Caution *When you send to a phonebook group, you will receive one notification (by whatever notification method you have set up, described on* page 13*) for every recipient in the phonebook group. This may result in a large number of notifications for a single transmission event, but the notifications are designed to let you know the transmission status for each intended recipient.*

Using SecureDocs and Certified Delivery

The SecureDocs feature lets users scan documents and send them to one or more e-mail addresses as encrypted PDF file attachments. The recipient must have the PDF's password in order to view the document.

The Certified Delivery feature lets users scan documents and direct them to your organization's Certified Delivery Web site. The recipient receives an e-mail message indicating that a document is available with a link to the Certified Delivery Web site. The link connects the user to the Web site where he can view all waiting documents.

Both SecureDocs and Certified Delivery must be installed and configured on your RightFax server for these features to work. For information on installing these RightFax features, see the RightFax Installation Guide and the RightFax SecureDocs Module Guide.

By default, all documents sent to e-mail addresses will be sent using SecureDocs, even if no document password is provided in the Metadata set. If you want to use the Certified Delivery feature, you must set this as the default send method in the RightFax MFP Module.

Note *Setting Certified Delivery as the default send method in the RightFax MFP Module will only affect documents sent to e-mail addresses. Documents sent to fax numbers will transmit normally as faxes.*

To set Certified Delivery as the default send method

1. On the RightFax server, select **Start > All Programs > RightFax EDC Monitor** to open the **EDC Monitor** application.

2. Select **Tools > Advanced EDC Configuration** to open the **Captaris EDC Configuration** dialog box.

3. Click the **DataFlows** tab.

4. Select **Sharp_MFP** in the list of DataFlows and click **Edit**. This opens the **Sharp_MFP DataFlow** dialog box.

5. Select FlowPoint #2, **Send_RightFax_Fax**, and click **Edit**. This opens the **Send_RightFax_Fax FlowPoint** dialog box.

6. Click **Configure Processor**. This opens the **RFSend FlowPoint Settings** dialog box.

7. Click the **Destination** tab.

Figure 2.3 Setting Certified Delivery as the default send method
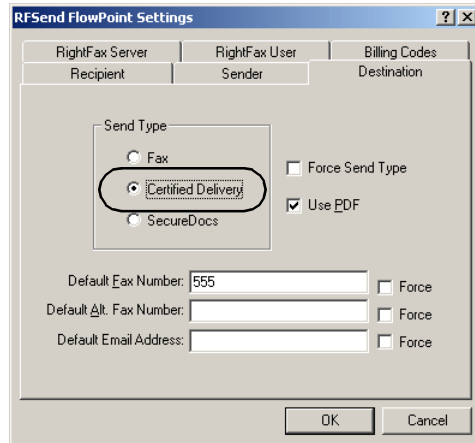
8. Select the option **Certified Delivery**.

Tip *Selecting the **Force Send Type** option on this dialog box will prevent other types of document transmission from functioning. If you select **Certified Delivery** or **SecureDocs** and this option is checked, documents sent to fax numbers will fail.*

9. Save the changes and exit.

■   ■   ■

Chapter 3
Advanced Configuration Settings in the Sharp DataFlow

The RightFax MFP Module includes a software component called the External Document Connector which is designed to act as a communication link between RightFax servers and several supported types of document-based hardware and software systems. All of the configuration settings for the RightFax MFP Module Sharp Extension described in this chapter are made in the External Document Connector. For a general overview of the External Document Connector component of the RightFax MFP Module, see Appendix A, "Understanding the External Document Connector").

Although the External Document Connector supports extensions for several types of hardware- and software-based document products, this guide and all of the configuration settings it discusses are specific to integrating RightFax with Sharp MFPs only.

Tip *The External Document Connector has many configuration settings, only a few of which are required to enable the Sharp Extension. This chapter describes only the required configuration settings for the most commonly used features. Some advanced settings in the External Document Connector which are not discussed in this guide are used mainly for troubleshooting and support purposes and do not apply to normal operation of the RightFax MFP Module. To read a description of any option, including the advanced options not discussed here, click the* **[?]** *icon displayed in the title bar of each dialog box, and then click the option you want described.*
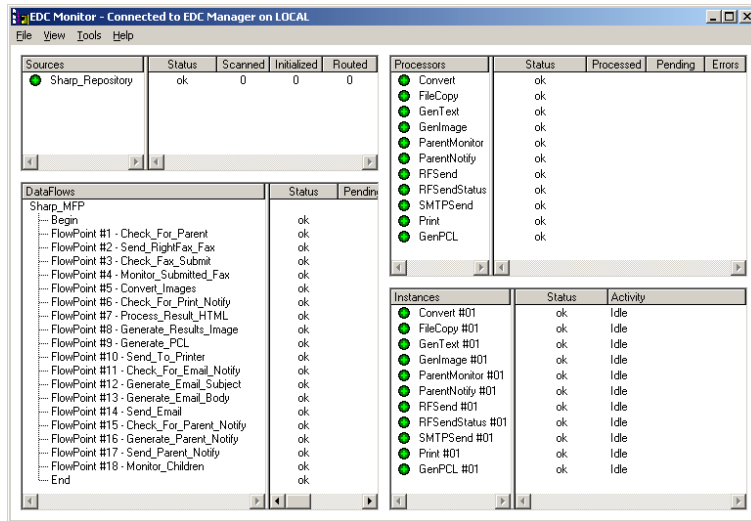
Configure the Sharp MFP Module Settings

After the Sharp MFP module has been installed and configured in the External Document Connector (described in Chapter 1, "Installing the RightFax MFP Module"), Sharp documents should begin being processed by the RightFax server. However, if you need to change one or more configuration settings after installation, you can access all of the Sharp MFP Module's configuration options throught the EDC Monitor.

Follow these steps to configure the Sharp MFP Module:

1. On the RightFax server, select **Start > All Programs > RightFax EDC Monitor** to open the **EDC Monitor** application.

   If the Sharp MFP module has been added correctly and the services are running, then **Sharp_Repository** will appear in the **Sources** pane along with Sharp status messages in the other panes.
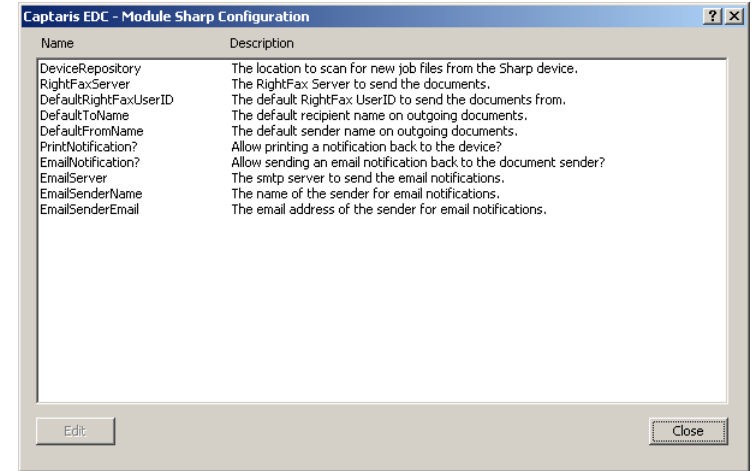
   Figure 3.1 Sharp status messages in EDC Monitor

2. Select **Tools > Advanced EDC Configuration** to open the **Captaris EDC Configuration** dialog box.

3. Click the **Modules** tab.

4. Select **Sharp MFP** in the list of modules and click **Edit**. This opens the **Sharp Module Configuration** dialog box.

   Figure 3.2 The Sharp Module Configuration dialog box

5. Select **DeviceRepository** and click **Edit**. This opens the **Editing Macro DeviceRepository** dialog box.

   Figure 3.3 Entering the location of the Sharp repository folder
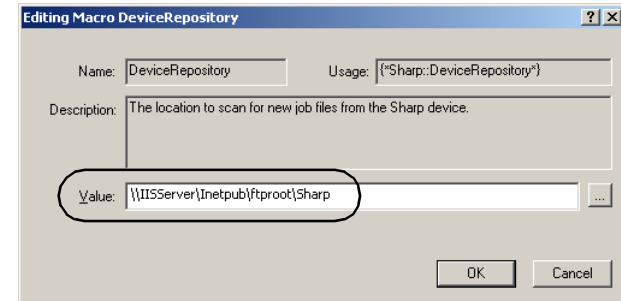

   The repository folder must be located on an IIS server on your network and be a subfolder of the \Inetpub\ftproot folder. All of the instructions in this guide assume that you will be using a subfolder called Sharp.

In the **Value** field, type or browse to the path to the Sharp repository folder on the IIS computer on your network. You may specify either a UNC path or a folder name on a mapped or local drive.

Click **OK** to return to the **Sharp Module Configuration** dialog box.

6. Select **RightFaxServer** and click **Edit**. This opens the **Editing Macro RightFaxServer** dialog box.

Figure 3.4 Entering the location of the RightFax server
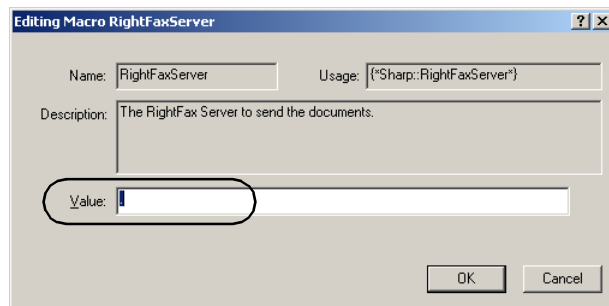
In the **Value** field, type the name of the RightFax server which the External Document Connector will use for transmitting documents. By default, a dot appears in this field indicating that the External Document Connector will use the RightFax server on local machine. You only need to change this value if you want the External Document Connector to use a RightFax server installed on a different computer. Click **OK** to return to the **Sharp Module Configuration** dialog box.

7. Select **DefaultRightFaxUserID** and click **Edit**. This opens the **Editing Macro DefaultRightFaxUserID** dialog box.

Figure 3.5 Entering the default RightFax user ID
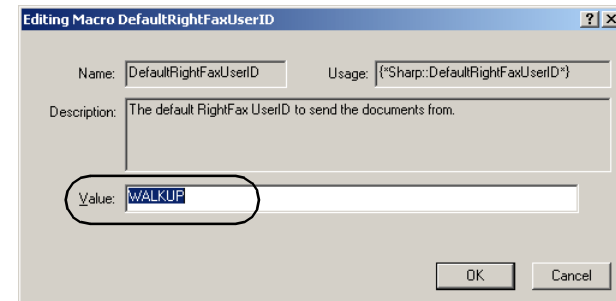
The Default RightFax user ID is set to WALKUP by default. This is the RightFax user ID that will be used for all faxes originating from Sharp MFPs that do not have a RightFax user ID specified. If you plan to use a fax template that requires users to enter their RightFax user ID when sending faxes, you do not need to change this setting. However, if you plan to use Sharp's generic fax functionality or a template that does not require users to enter a RightFax user ID, you must set this option to the user ID that you want to be used by the RightFax server to send faxes.

If you want to use the default user ID "WALKUP," you *must* create this user ID in RightFax using Enterprise Fax Manager. Alternatively, you can set the **Value** field to the name of an existing RightFax user ID. Regardless of the user ID you specify, the user ID should be configured in RightFax with the sending options that you want for all faxes originating from Sharp MFPs. For information about creating and configuring RightFax user IDs, refer to the *RightFax Administrator's Guide*.

Click **OK** to return to the **Sharp Module Configuration** dialog box.

8. Select **DefaultToName** and click **Edit**. This opens the **Editing Macro DefaultToName** dialog box.

Figure 3.6 Entering the default destination recipient name

In the **Value** field, enter a name that will be used as the name of the intended recipient on the fax cover sheet if no recipient name is specified by the sender. Click **OK** to return to the **Sharp Module Configuration** dialog box.

9. Select **DefaultFromName** and click **Edit**. This opens the **Editing Macro DefaultFromName** dialog box.

Figure 3.7 Entering the default sender name

In the **Value** field, enter a name that will be used as the name of the sender on the fax cover sheet if no RightFax user ID is specified by the sender. Click **OK** to return to the **Sharp Module Configuration** dialog box.

10. Select **PrintNotification?** and click **Edit**. This opens the **Editing Macro PrintNotification?** dialog box.

Figure 3.8 Specifying whether to print a transmission status notification

In the **Value** field, select **Print a notification back to the device** if you want a transmission status message to be automatically printed on the Sharp MFP each time it is used. If you do not want a status message to print automatically, select **Do not print to the device**. Click **OK** to return to the **Sharp Module Configuration** dialog box.
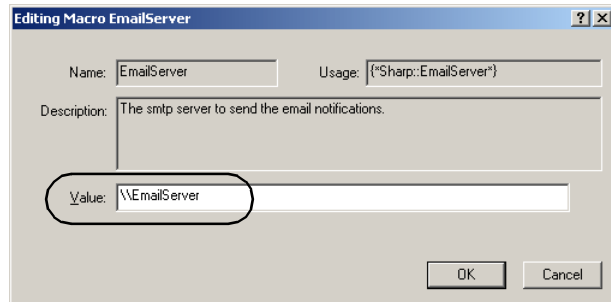
11. Select **EmailNotification?** and click **Edit**. This opens the **Editing Macro EmailNotification?** dialog box.

Figure 3.9 Specifying whether to send a transmission status notification as an e-mail message

In the **Value** field, select **Email a notification back to the sender** if you want a transmission status message to be automatically e-mailed to the sender each time a document is sent. If you do not want a status message to be e-mailed to the sender, select **Do not email the sender**. Click **OK** to return to the **Sharp Module Configuration** dialog box. The remaining configuration options discussed in this section are required only if you selected the option to send notifications via e-mail.

12. Select **EmailServer** and click **Edit**. This opens the **Editing Macro EmailServer** dialog box.

Figure 3.10 Specifying the name of the e-mail server

In the **Value** field, enter the name or IP address of an SMTP server that will be used to route e-mail notification messages. Click **OK** to return to the **Sharp Module Configuration** dialog box.

13. Select **EmailSenderName** and click **Edit**. This opens the **Editing Macro EmailSenderName** dialog box.

Figure 3.11 Specifying the from-name for e-mail notifications
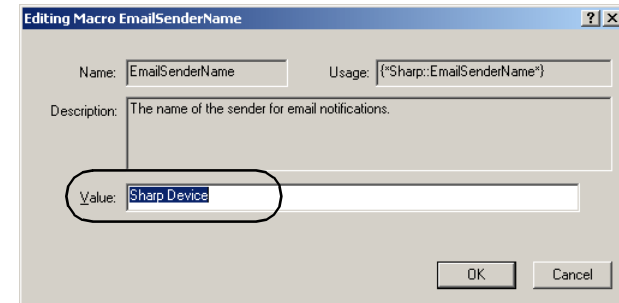
In the **Value** field, enter a name that will be used as the name of the sender on e-mail notifications. Click **OK** to return to the **Sharp Module Configuration** dialog box.

14. Select **EmailSenderEmail** and click **Edit**. This opens the **Editing Macro EmailSenderEmail** dialog box.

Figure 3.12 Specifying the source e-mail address for e-mail notifications
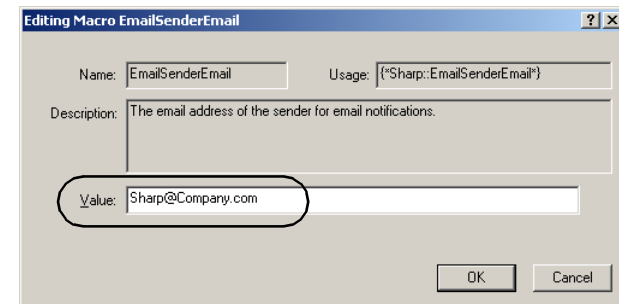
In the **Value** field, enter an e-mail address that will be used as the address of origin for e-mail notifications from the Sharp device. Many SMTP servers, for security reasons, require a sender's e-mail address before processing a message. Click **OK** to return to the **Sharp Module Configuration** dialog box.

15. Click **Close** to close the **Sharp Module Configuration** dialog box.

Configuring the Sharp_MFP FlowPoints

The Sharp_MFP DataFlow contains 18 numbered FlowPoints specific to the Sharp Extension. Additional "Begin" and "End" FlowPoints, generic to all DataFlows, are also included making a total of 20 FlowPoints.

To open the list of Flowpoints in the Sharp_MFP DataFlow

1. On the RightFax server, select **Start > All Programs > RightFax EDC Monitor** to open the **EDC Monitor** application.

2. Select **Tools > Advanced EDC Configuration** to open the **Captaris EDC Configuration** dialog box.

3. Click the **DataFlows** tab.

4. Select **Sharp_MFP** in the list of DataFlows and click **Edit**. This opens the **Sharp_MFP DataFlow** dialog box. This dialog box lists all of the FlowPoints in the Sharp DataFlow.

Figure 3.13 The FlowPoints in the Sharp_MFP DataFlow
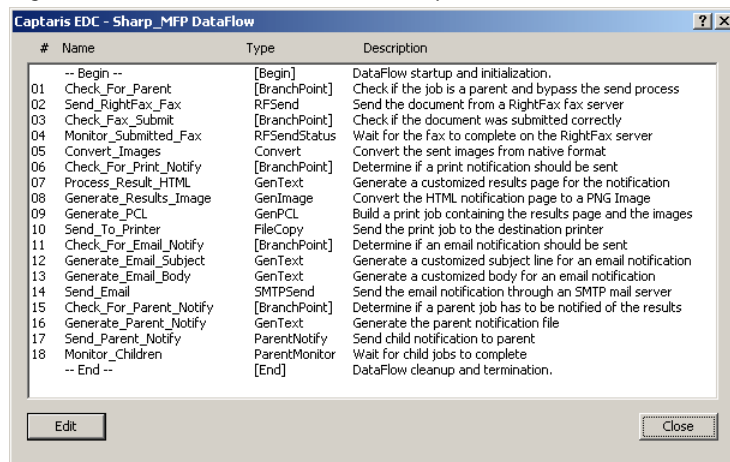
5. To edit a FlowPoint's configuration settings, select the FlowPoint in the list and click **Edit**.

"Table 3a: Sharp Extension FlowPoints" describes all of the FlowPoints in the Sharp_MFP DataFlow.

Table 3a Sharp Extension FlowPoints

FlowPoint Name	Description
Begin	Initializes the DataFlow. No configuration necessary.
Check_For_Parent	Controls the sending of documents to multiple recipients using RightFax phonebooks. No configuration necessary.
Send_RightFax_Fax	Submits the document to the RightFax Server. Lets you configure several settings related to the metadata that is sent to the RightFax server along with the document.
Check_Fax_Submit	Confirms that the document was correctly sent to the RightFax server. No configuration necessary.
Monitor_Submitted_Fax	Monitors the RightFax server until the document has been sent. Lets you configure some settings related to transmission timeouts.
Convert_Images	Converts the sent images to graphic formats for use by the Process_Results_HTML FlowPoint. Configuration options are disabled for the Sharp Extension.
Check_For_Print_Notify	Determines if a print notification should be generated. No configuration necessary.
Process_Results_HTML	Creates an HTML-based results page. No configuration necessary.

Table 3a Sharp Extension FlowPoints (Continued)

FlowPoint Name	Description
Generate_Results_Image	Converts the HTML results page to a PNG image for use in notifications. No configuration necessary.
Generate_PCL	Converts the results page to PCL format for printing. Lets you configure printed page specifications.
Send_To_Printer	Sends the results page to a specified network folder, print queue, HTTP port, or FTP site. Lets you select and configure the destination.
Check_For_Email_Notify	Determines if an e-mail notification should be generated. No configuration necessary.
Generate_Email_Subject	Generates the subject line for e-mail notifications. No configuration necessary.
Generate_Email_Body	Generates the body of the e-mail notification. No configuration necessary.
Send_Email	Sends the e-mail notification. Lets you select the SMTP server and configure several transmission defaults.
Check_For_Parent_Notify	Controls the sending of documents to multiple recipients using RightFax phonebooks. No configuration necessary.
Generate_Parent_Notify	Controls the sending of documents to multiple recipients using RightFax phonebooks. No configuration necessary.

Table 3a Sharp Extension FlowPoints (Continued)

FlowPoint Name	Description
Send_Parent_Notify	Controls the sending of documents to multiple recipients using RightFax phonebooks. No configuration necessary.
Monitor_Children	Controls the sending of documents to multiple recipients using RightFax phonebooks. No configuration necessary.
End	Terminates dataFlow and deletes temporary files. No configuration necessary.

Sending Delivery Notifications

A notification message about each transmission can be provided to the user either as a printout or as an e-mail message.
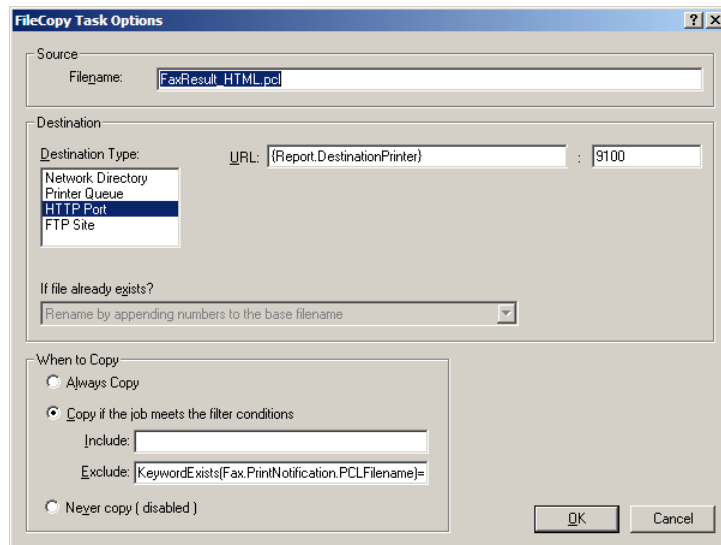
Setting up print notifications

When you first configured the Sharp_MFP DataFlow, you had the option to enable printed notifications (see .) If you selected this option, the Sharp Extension will automatically print a results page on the same Sharp MFP from which the document was sent. If you did not enable this option when you first configured the Sharp Extension, you must do so to enable print notifications.

In addition, the Sharp device must have Port 9100 printing enabled and you must configure the EDC to print to a Port 9100 printer. Refer to your Sharp documentation for information on enabling Port 9100 printing.

To configure Port 9100 printing in the EDC

1. On the RightFax server, select **Start > All Programs > RightFax EDC Monitor** to open the **EDC Monitor** application.

2. Select **Tools > Advanced EDC Configuration** to open the **Captaris EDC Configuration** dialog box.

3. Click the **DataFlows** tab.

4. Select **Sharp_MFP** in the list of DataFlows and click **Edit**. This opens the **Sharp_MFP DataFlow** dialog box.

5. Select FlowPoint #10, **Send_To_Printer**, and click **Edit**. This opens the **Send_To_Printer FlowPoint** dialog box.

6. Click **Configure Processor**. This opens the **FileCopy Tasks** dialog box.

7. Click **Edit**. This opens the **FileCopy Task Options** dialog box.

Figure 3.14 Configuring print notification options

8. Change the default setting in the **URL** field to **{Device.IP}**.

9. Save the changes and exit.

Setting up e-mail notifications

E-mail notifications can be sent to Sharp users only if the user has provided an e-mail address in the **Reply To** field on Metadata sets that include this field (see "Create a RightFax User Interface on the Sharp" on page 17).

When you first configured the Sharp_MFP DataFlow, you had the option to enable e-mail notifications (see page 13.) If you did not enable this option when you first configured the Sharp Extension, you must do so to enable e-mail notifications.

To configure e-mail notifications

1. On the RightFax server, select **Start > All Programs > RightFax EDC Monitor** to open the **EDC Monitor** application.

2. Select **Tools > Advanced EDC Configuration** to open the **Captaris EDC Configuration** dialog box.

3. Click the **DataFlows** tab.

4. Select **Sharp_MFP** in the list of DataFlows and click **Edit**. This opens the **Sharp_MFP DataFlow** dialog box.

5. Select FlowPoint #14, **Send_Email**, and click **Edit**. This opens the **Send_Email FlowPoint** dialog box.

6. Click **Configure Processor**. This opens the **Email FlowPoint Settings** dialog box.

Figure 3.15 Configuring e-mail notification options
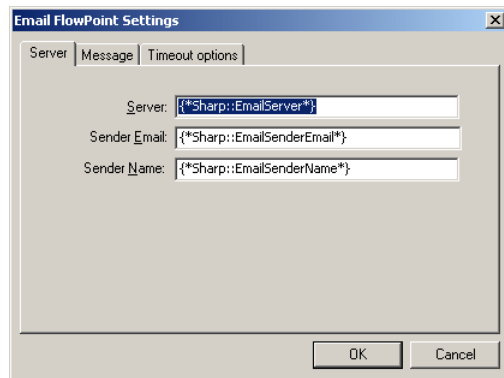
7. Options on the **Server** tab contain macro data that uses the information specific to the user that is receiving the notification. You can change the options so that all notifications are sent to a single address.

8. The options on the remaining tabs in this dialog box let you specify the message subject text and other details, and configure some SMTP server timeout settings. For information on how to complete any of the fields on this dialog box, click the **[?]** icon displayed in the title bar and then click the option you want described.

9. Save the changes and exit.

Understanding Filters

Many of the Sharp_MFP FlowPoints let you configure filter options. Filters define a subset of documents that will be processed by the FlowPoint. Documents that do not meet the filter criteria will be ignored by the FlowPoint and passed on to the next FlowPoint in the chain.

Figure 3.16 Example of filter options on a FlowPoint configuration screen
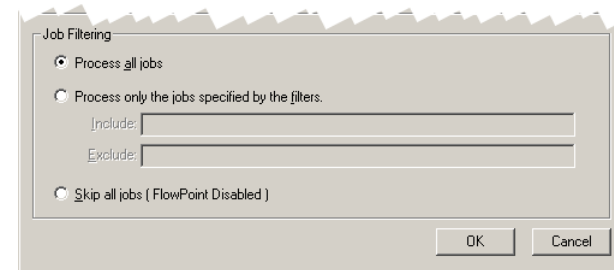
By default, the **Process all jobs** option is selected for most FlowPoints and no filters are configured, so all documents will be processed.

⚠ *Warning All FlowPoints that use the GenPCL and FileCopy processors have a "KeywordExists" exclude filter that prevent the DataFlow from failing if a keyword in the job file from the previous FlowPoint doesn't exist. Although you can add additional filters to these FlowPoints, you should leave these filters unchanged.*

To create a filter, specifying whether jobs should be explicitly included or explicitly excluded by the FlowPoint, select **Process only the jobs specified by the filters**.

If you want to process only the jobs that meet your filter criteria, specify filter data (keywords) in the **Include** box. If you want to process most jobs, but specifically *exclude* jobs that meet your filter criteria specify filter data in the **Exclude** box. Criteria in the **Exclude** box will be evaluated by the connector first, and it will override criteria in the **Include** box.

The keywords and data are not case-sensitive. To enter a string of keywords and data, type a semicolon between each keyword and value pair. The semicolon acts as a logical OR statement, so documents that meet any one of your keyword criteria will be filtered.

To filter documents, the data values for the keyword must match the RightFax document data. For example, to process all documents that include the user ID "sales," documents with the user ID "sales23" will *not* be imported.

You can create filters based on any keyword in the job file. You can view many of these keywords by opening the sample sent and received fax job files you create with the External Document Connector. The sample job files are saved in the Program Files \RightFax\EDC\Modules\RightFax folder and can be viewed with any text editor. These files have the extension .job. The following table lists some of the keywords most commonly used for creating filters.

Table 3b Common keywords used for filtering

Keyword	Description	Example
{BillingInfo1} {BillingInfo2}	Billing information from the RightFax document.	{billinginfo1}=marketing
JobType	Job types are: • SendJob • ReceiveJob • PrintJob	jobtype=sendjob
{RemoteCSID} {RemoteID}	The remote caller subscriber ID (CSID) of the RightFax document.	{remoteID}=5550022

Table 3b Common keywords used for filtering (Continued)

Keyword	Description	Example
{UniqueID}	The unique ID of the document, assigned by the RightFax server.	{uniqueID}= SAR3D64FD3F1D16
{UserID}	The RightFax user ID of the person who sent the document.	{userid}=sales

Example
{BillingInfo1}=international;{UserID}=sales;{UserID}=marketing

In some cases, the same filter must be added in several related FlowPoints in order to work as expected. This is true for FlowPoints 7 through 10, which all manage print notifications, and for FlowPoints 12 through 14, which all manage e-mail notifications. If you add a filter to any of these FlowPoints, you must also add the same filter to its related FlowPoints.

■ ■ ■

Appendix A
Understanding the
External Document Connector

Overview of the External Document Connector

The External Document Connector (EDC) is a module for the RightFax server that monitors the MFP repository folder for documents to process and transmit. The External Document Connector processes documents using a set of steps called a "DataFlow." The DataFlow is comprised of several distinct processes called "FlowPoints." Each FlowPoint monitors a specific folder for fax documents, acts on the documents, and then passes them on to the next FlowPoint.

Using the EDC Monitor

The External Document Connector includes a management tool called the External Document Connector Monitor (EDC Monitor). Use the EDC Monitor to monitor the status of the connectors and processors under the control of the EDC, add and delete processor services, and configure the EDC components.

⚠️ **Caution** *The EDC Monitor application does not display errors that occur with individual processors. It will only report specific job files that have encountered errors. To check for errors in the External Document Connector's processors, you must review the Event Log.*

To run the EDC Monitor program, select **Start > Programs > RightFax EDC Monitor**. The **EDC Monitor** program window opens.

Figure 3.17 The External Document Connector Monitor
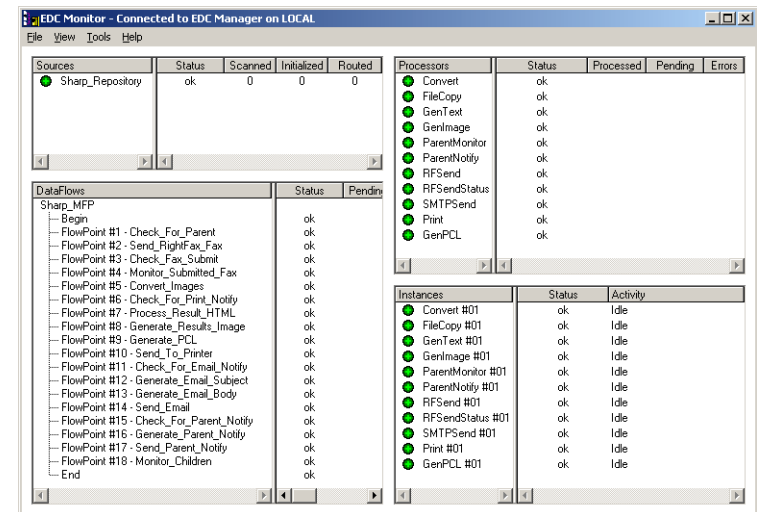
Installed MFP Module extensions are listed in the top left pane, and the DataFlow and individual FlowPoints are displayed in the bottom left pane. In the top right pane, all of the processors that are

required by the FlowPoints are listed, and the separate instances of each processor are listed in the bottom right pane. Current status information is displayed for all objects listed in the EDC Monitor. The following table defines each of the status columns in the right pane.

Table A1 EDC Monitor Status Definitions

| Column heading	Definition
Status	The External Document Connector component's status. Possible values are: • Failed - The component has shut down. • Hung - The component is no longer responding. • Job Errors - Errors prevented the image from processing. • OK - The image was processed successfully.
Processed	The total number of fax images that have been processed by this component.
Pending	The total number of jobs currently queued for processing by this component.
Errors	The total number of processing errors that have been logged by this component.
Activity	The current active state of the component. Possible values are: • Idle - The component is currently inactive. • Processing Job- The component is currently processing a job. • Paused- The component has been paused. No jobs will be processed. • Shut Down- The component service is currently stopped.

Monitoring the Processor Services

The EDC Manager and all of the individual processors that are managed by the External Document Connector are installed as services. The EDC Monitor can be used to view the status of these services and to add and remove services.

To monitor the status of the External Document Connector processor services

1. On the RightFax server, select **Start > Programs > RightFax EDC Monitor**. The **EDC Monitor** program window opens.

2. Select **Tools > Services**. This opens the **Services** dialog box.

Figure 3.18 The Services dialog box
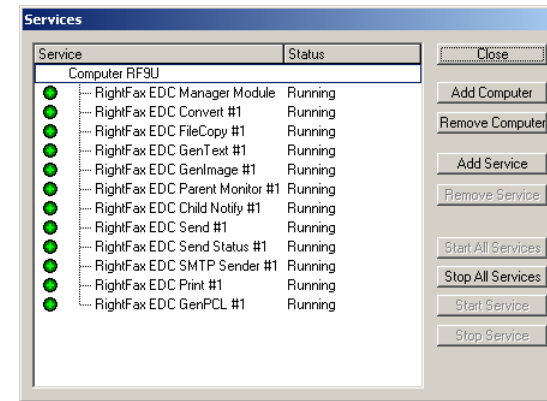
This dialog box displays the status of the EDC Manager service (which controls all of the processors) as well as the status of the individual processors.

To start or stop a service, select the service name and click **Start Service** or **Stop Service**. To start or stop all of the services, select the computer name at the top of the list and click **Start All Services** or **Stop All Services**.

Adding and removing processors

You can run a maximum of 16 of each type of processor. Processors can be run on the same computer that runs the External Document Connector (the RightFax server) or on remote computers to take advantage of the additional processor power.

Note *Although it is possible to install and configure more than 16 of each type of processor, only 16 of each will actually function at any given time.*

To add new instances of a processor

1. Run the EDC Monitor and select **Tools > Services** to open the **Services** dialog box.

2. If you want to add the service to a remote computer that is not listed, click **Add Computer** and specify the name of the remote computer.

3. Select the computer to which you want to add the service and click **Add Service**. This opens the **Add a Service** dialog box.

Figure 3.19 The Add a Service Dialog Box
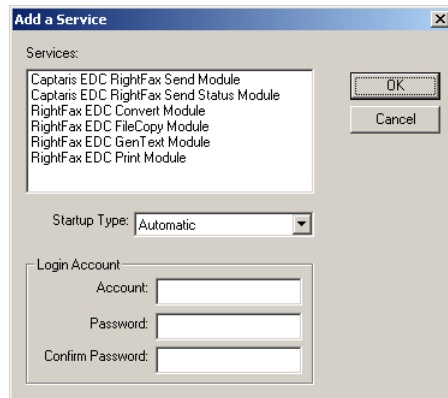
4. Under **Services**, select the type of service to add.

5. Under **Login Account**, enter the user name and password of the user account that the service will use to start up. This user account should have full administrative privileges to the computer you selected in step 3.

6. Click **OK**.

Note *If you are adding processors to a remote computer and you receive the message "EDC Manager has not been properly configured to allow services to be installed," or if the services fail to start, see the following section on adding processes to a remote computer.*

If you are adding processors to a remote computer

To run External Document Connector processors, a remote computer must know how to locate certain folders on the RightFax server used by the processors. You must enter the share names of these folders in the RightFax External Document Connector Manager Configuration before you will be able to run the processor on remote computers.

1. Run the EDC Monitor and select **Tools > Advanced EDC Configuration** to open the **Captaris EDC Configuration** dialog box.

2. Click the **System** button. This opens the **EDC System Settings** dialog box.

   Figure 3.20 Specifying the remote paths that let you add processes to remote computers
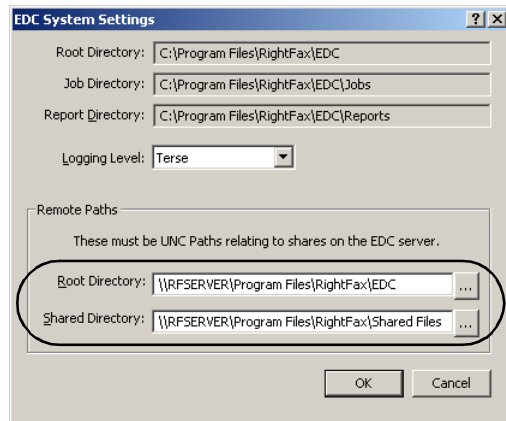
3. In the **Root Directory** box, enter the UNC path to the share name of the RightFax\EDC folder on the computer on which the External Document Connector is installed (the RightFax server).

   Example \\RFSERV\Program Files\RightFax\EDC

4. In the **Shared Directory** box, enter the UNC path to the share name of the RightFax\Shared Files folder on the computer on which the External Document Connector is installed (the RightFax server).

   Example \\RFSERV\Program Files\RightFax\Shared Files

To remove processors

1. Run the EDC Monitor and select **Tools > Services** to open the **Services** dialog box.

2. Select the service name.

3. Click **Stop Service**.

4. When the service is stopped, click **Remove Service**.

■   ■   ■

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